



## Appeals Reporting

### What does this report show? And why should I use it?

The appeal analysis report provides an overview of the performance of selected appeals. One should use this reporting tool solicitation responses. For example, if one's area sent a solicitation letter to 100 people in the fall and again in the spring, the following appeals reports will provide a good method for comparing how well the appeals performed by donations and response. This information can sometimes be used for testing. Testing can often allow one to refine appeal messaging.

### Where do I find it in Raiser's Edge?

1. Reports → Analytical Reports → **Appeals Analysis**
2. Reports → Campaigns, Funds, and Appeals Reports → **Appeals Performance Analysis**

### What should I be aware of when running this report?

- On the **General** tab, one can specify the date range for the report, as well as filter the report using a query.

**Report Type** on the Appeal Analysis report allows one to export information on each individual who received the appeal and the constituents response to the appeal. This report can be very large.

- The **Filter** tab allows one to filter the report by a specific fund, constituent code (eg. Graduate Alumni, Parent, etc.), and, most importantly, by appeal. The Appeals Performance Analysis adds an additional filter to allow one to sort by gift solicitors as well.
- On the **Gift Types** tab, one can select which gift types you'd like to see (eg. Pledge, Cash, Pay-Cash, Stock/Property). For more information on what each Gift Type represents, reference the document "Gift Type Definitions."

The Appeals Analysis report allows one to include three columns in order to compare different gift types. For example one column can be include gift types that represent cash only gifts, another for pledges, and a third for gift-in-kinds.

- The **Attributes** tab can be helpful if you would like to include or exclude certain segments of your constituency or even particular appeal categories.
- The **Ind. Address** tab is included if you selected detail on the Appeals Analysis report. This tab allows for one to determine what information about the donor should be included in the report.
- The **Graph** tab allows one to include a graph on the Appeal Performance Analysis report (this feature is unavailable on the Appeals Analysis report). You can decide the type of graph, data, titles of the axis, and where to place the graph within the generated report.
- **Format** tab allows one to create a title and subtitle, determine whether or not to create a criteria report, include packages (you most likely would want to include packages, as they are going to be required when creating appeals), create the page and/or report footer, determine miscellaneous display options and orientation.

The Appeals Performance Analysis report allows one to Sort/Break the report as well. You can sort by one of the available fields and then break the report by that field as well.



## Fund Comparison Summary Report

### What does this report show? And why should I use it?

Fund Comparison Summary reports show fund performance over multiple reporting periods, such as fiscal years. This report is helpful for seeing how one fund has performed over fiscal years or seeing how a collection of funds compare against each other over fiscal years.

Each Development Officer has three template Fund Comparison Summary reports on their homepage. A modified report can be easily created as using "Save as..."

### Where do I find it in Raiser's Edge?

Reports → Campaigns, Funds, Appeals Reports → Fund Comparison Summary

### What should I be aware of when running this report?

- On the **General** tab, you can specify the date range for the report, as well as filter the report using a query. Be aware that this date range must match the Report Periods (see below) for an accurate report
- The **Filter** tab allows you to filter the report by specific funds and constituent code (eg. Graduate Alumni, Parent, etc.)
- On the **Gift Types** tab, you can select which gift types you'd like to see (eg. Pledge, Cash, Pay-Cash, Stock/Property). For more information on what each Gift Type represents, reference the document "Gift Type Definitions".
- The **Report Periods** tab is where you define the specific report periods.
  - On first row, enter Start Date and End Date (eg. 7/1/2006 and 6/30/2007)
  - Click on "Autofill Dates"
  - Enter number of periods → click OK
  - Click on "Default Heading Values" or manually enter headers in "Heading 1" (eg. FY07, FY08, etc). "Heading 2" does not need to be filled in
  - For a total of the entire time range, enter one more row with the first period's Start Date and the last period's End Date (eg. 7/1/2006 and 6/30/2011)
- The **Format** tab allows you to rename the report title and alter other formatting options



## Donor Category Report

### What to use this report for?

Donor Category Reports offer a quick way to pull a list of donors, categorized by cumulative giving level. You choose a specific time frame and fund(s) to consider. Your output could include name, address, phone number and total giving.

### Where do I find it in Raiser's Edge?

Reports → Analytical Reports → Donor Category Reports

### What should I be aware of when running this report?

- On the **General Tab**: Select the date range you are interested in reporting on, decide how to handle soft credits and matching gifts, and set your constituent include flags. You can attach your report to a query, but this is not necessary in many cases as the report itself contains many filtering options.
- On the **Filters Tab**: Choose ways to filter your report results. Selecting specific funds is the most common choice here. Other options include filtering by Constituent code or Appeal.
- On the **Gift Types Tab**: choose the gift types you want to consider, and choose how to handle pledge unfulfilled balances.
- The **Attribute Tab** allows you to include/exclude donors based on certain attributes.
- Use the **Ind. Address and Org. Address Tabs** to choose how you want donor addresses to display in the report, if you want them to show.
- On the **Format Tab**:
  - Click "Detail", then select the desired Donor Category Table. This table determines what giving levels to categorize your donors by. Once you choose the desired table, select the specific giving levels you want considered in your report. Also in the "Detail" section, choose to sort by constituent name or amount given (within each category).
  - Also on the Format Tab: Enter a report title, footers, add constituent code or total cumulative giving columns for each constituent, choose a specific name format to use for donors appearing in the report.

### Report Notes:

- After you've set up your report (filters, donor category table, etc.), you can choose to create a query of everyone included in your report. This can help you avoid writing a complex query to achieve the same result.
- If you don't see a donor category table with values and/or labels that meet your needs, ask Advancement Services to create a new one for you.